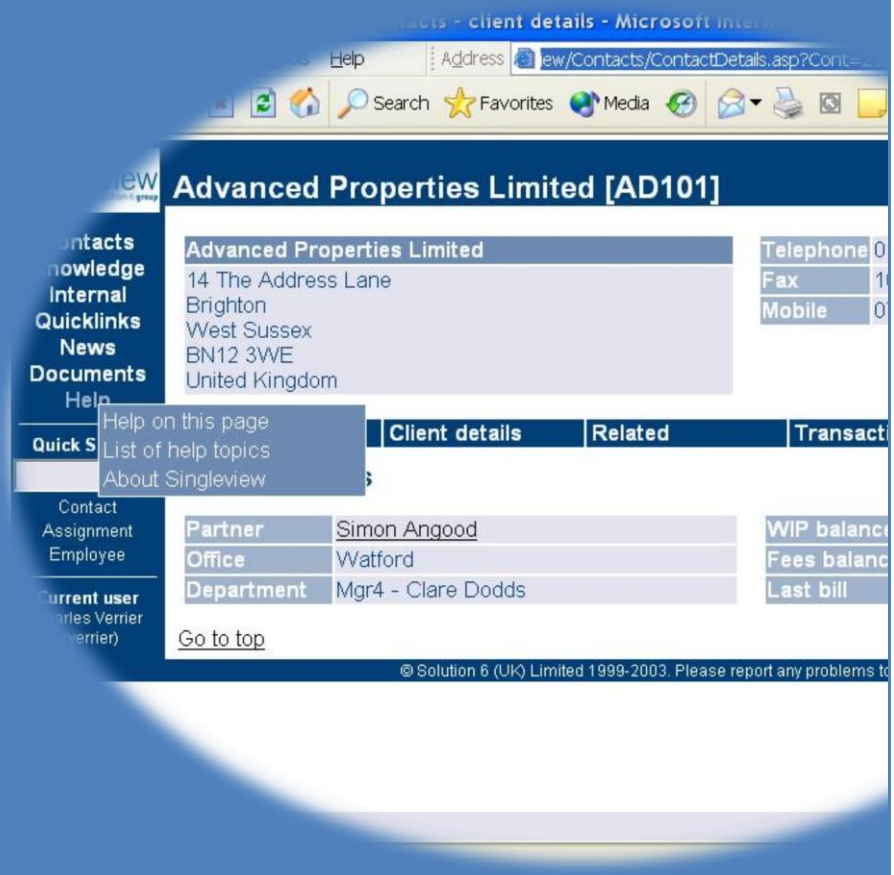
# Using Singleview with Office 2007/2010



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About the author….

Charles Verrier was the product manager for Singleview from its earliest days as 'Viztopia Knowledge Management'. He had primary responsibility for the development and implementation of the product throughout its life.

Charles personally consulted, installed and implemented the majority of Singleview systems and is deeply familiar with the products' design and functions.

In 2007, Charles left MYOB (as it was) to become a freelance consultant with a specific focus on Electronic Document Management systems for the accountancy profession.

Charles has consulted and trained on CCH Document Manager - developing feedback for CCH on the product, writing training materials and developing best practice for the implementation of the software.

Charles has developed ties with all of the major document management suppliers – developing an unrivalled breadth of understanding of document management practices within the profession – from sole traders to national firms. He was on the judging panel in the 'Paperless Office' category for the SIFT 2010 Software Satisfaction Awards.

Charles has completed agent accreditation with both INVU and Autonomy WorkSite, and has provided advice and consulting services to several software companies on their document management offerings.

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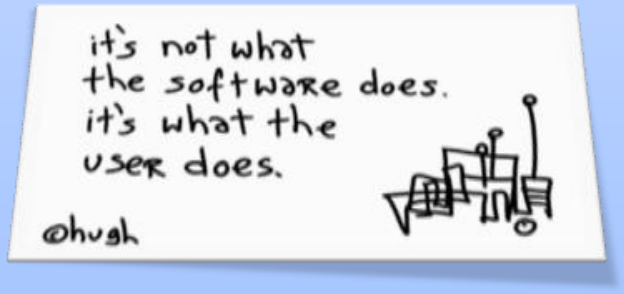


## BACKGROUND

In 2007, Microsoft released Office 2007 (hence the name!) . This product was a major departure from previous versions of Office. The user interface changed radically, and Microsoft also introduced a new file-format, called 'Open XML'. The new document format carried through to the subsequent release of Office 2010.

The new OpenXML file formats can be easily identified by their new four-character file extensions.

- Microsoft Word **.DOCX**
- Microsoft Excel **.XLSX**
- Microsoft PowerPoint **.PPTX**

Associated file extensions also changed (so, Word Templates became identified with .**DOTX**, and so on).

Singleview 4.40 was released in mid 2007 – too late for development work to incorporate these new formats. Singleview was not developed further so MYOB (subsequently CCH) never specifically addressed this issue.

Despite that, it IS possible to configure Singleview to fully support the latest version of Office, including the new file formats. This document discusses the issues that need considering and the practical steps needed to achieve full operation with Office 2007/10.

## THE OFFICE COMPATIBILITY PACK

When Office 2007 was launched, Microsoft released an optional download for Office 2003 that allowed it to read the new-format documents. While this pack is more than good enough to allow a Word 2003 user to open a Word 2007 document, it is NOT the same as giving that user a proper copy of Word 2007.

**The pack does NOT allow Office 2003 users to process Office 2007/10 documents in Singleview**. If a user attempts to work with an Open XML document in Singleview, they will encounter problems opening, editing and viewing those documents (although Singleview will store them safely).

**THE TECHY BIT (for those who are interested):** There is a limitation with the Office Compatibility pack in that it does not correctly react when a web-browser is asked to display an Open XML document, because it fails to correctly interpret the MIME type of the document. There is no workaround for this – except upgrading to a full copy of Office 2007/10 on the desktop.

# PLANNING THE ROLL-OUT

## SWITCHING TO THE NEW FILE FORMAT

If you are migrating your organisation to Office 2007 or 2010, then you need to make a decision about whether you are going to simply upgrade the software, or whether you are also going to start using the new Open XML file-formats as well.

**Arguments FOR changing to Open XML**

- The new file format is here to stay – you're going to have to change sooner or later!
- The new file format is quite a lot more efficient – a document in the new format is typically HALF the size of the same document in the old format. Documents also save and load faster.
- Quite a few of the latest features in Word/Excel are only available when using the new format. If operating in 'compatibility mode' you will be offered a reduced range of options on many menus.

Microsoft recognises that you may wish to start using the new software while delaying the move to Open XML until you are ready.

Office 2007/10 can be configured so that it continues to save using the 'traditional' file formats as a default, so you have the option of upgrading the desktop software while continuing to create 'DOC' and 'XLS' files.

There is an article that discusses this scenario in more detail here….

http://technet.microsoft.com/en-us/library/cc178998.aspx

## SINGLEVIEW EMAIL FILER AND OFFICE 2010

The v4.40 Singleview Email Filer does NOT support Outlook 2010. CCH have created and released an updated version of the email filer specifically for Outlook 2010.

If you are upgrading your users to Office 2010 (and you probably will be, as it's quite a lot better than Office 2007) then you will need to obtain the updated Email filer from the CCH Support web site before you start. Make sure you incorporate time for this re-install on every desktop into your roll out plans.

Note: The updated email filer does NOT support the 64-bit version of Office. I recommend against deploying Office 2010 64-bit edition in any event.

## SERVER CONFIGURATION COMBINATIONS

When considering the upgrade, there are three combinations that might reasonably be considered:

### LIMITED SUPPORT CONFIGURATION

- Server Copy = Office 2003
- Desktops = Office 2007/10
- Templates = Remain in 2003 format

Singleview will not generate 2007 format documents (because the templates remain unchanged)

There may be some benefit to installing the Office Compatibility Pack on the server copy of Office, to ensure that proper icons are displayed, and any 2007 format templates will have partial support (although you will not be able to create templates that utilise the full features of Office 2007/10).

This configuration is not really recommended for long term use.

### LEGACY FORMAT OPTION

- Server Copy = Office 2007
- Desktops = Office 2007/10
- Templates = Remain in 2003 format

Once desktop PCs are upgraded to Office 2007/10, then overall handling of Open XML format documents will improve.

Singleview will still create 2003-format (DOC/XLS) documents, because the templates haven't been upgraded. This is not a problem, and you can operate Office 2007/10 using older formats for as long as you wish.

Any 2007/10 documents that ARE submitted to the system will be fully supported. Users will be able to view and edit them, and they will remain as DOCX or XLSX files.

### FULL SUPPORT OPTION

- Server Copy = Office 2007
- Desktop = Office 2007/10
- Templates = Converted to 2007/10 Open XML format

This configuration represents a full transition to Office 2007 and the Open XML format. New documents created by Singleview will be in the new format.

2003-format documents that are encountered (received from clients, for example, or just older documents in the filing system) will be recognised and supported. They will NOT be converted into the Open XML format unless the user does that manually.

This final option is clearly going to deliver the best results.

## A RECOMMENDED PROJECT PLAN

I advise treating the Office software upgrade and the file-format transition as two **separate** projects that can be run on different timetables. The software upgrade is going to be difficult enough (with staff re-training, compatibility testing of add-ins etc.) without also needing to manage a change to the new file formats on your network as well.

This approach means you can complete the roll-out of Office 2007/10 without having to manage a situation where half the firm is using the new file-format and half is still on the old one.

I recommend the following staged approach to a migration:

1. Apply the central server configuration changes described later in this document to prepare Singleview to support the Open XML formats. **USERS WILL SEE NO VISIBLE CHANGE**

2. Replace Office 2003 on the Singleview Server with Office 2007 (Setting the default file format so that it still creates 2003 format documents). **USERS WILL SEE NO VISIBLE CHANGE**

3. Upgrade a single desktop PC with Office 2007/10. Verify that everything works, and that you can create, open and edit documents without problem. Check that templates are still working.

4. Complete the rollout of the Office 2007/10 software across the organisation – setting the default file-format to be the 2003 version. **USERS WILL START USING THE NEW SOFTWARE, BUT WILL STILL BE WORKING WITH 2003-FORMAT DOCUMENTS, SO YOU RETAIN A CONSISTENT OUTPUT.**

5. Prepare a converted set of Open XML templates (in a separate folder) so that, when you are ready, you can switch Singleview to 'point' at the new template location in an instant.

6. Once the software rollout has been completed and all users are operating the new software successfully, you can then proceed to a firm-wide transition to the Open XML file-format on a date that suits you by….

    a) Setting a date from which all new documents must be created in the new format
    b) Briefing clients and staff about the change
    c) Altering the Singleview template library definition to point at the folder containing the converted templates
    d) Using group policies to re-configure Word/Excel on each desktop to save in Open XML format by default
    e) Re-configuring the copy of Office on the Singleview Server to save in Open XML by default

There is a guide to using group polices to configure the default file format in Office here…

http://technet.microsoft.com/en-us/library/cc178949(office.12).aspx

## RECONFIGURING THE SINGLEVIEW SERVERS

### STEP 1 – CONFIGURE IIS MIME SUPPORT

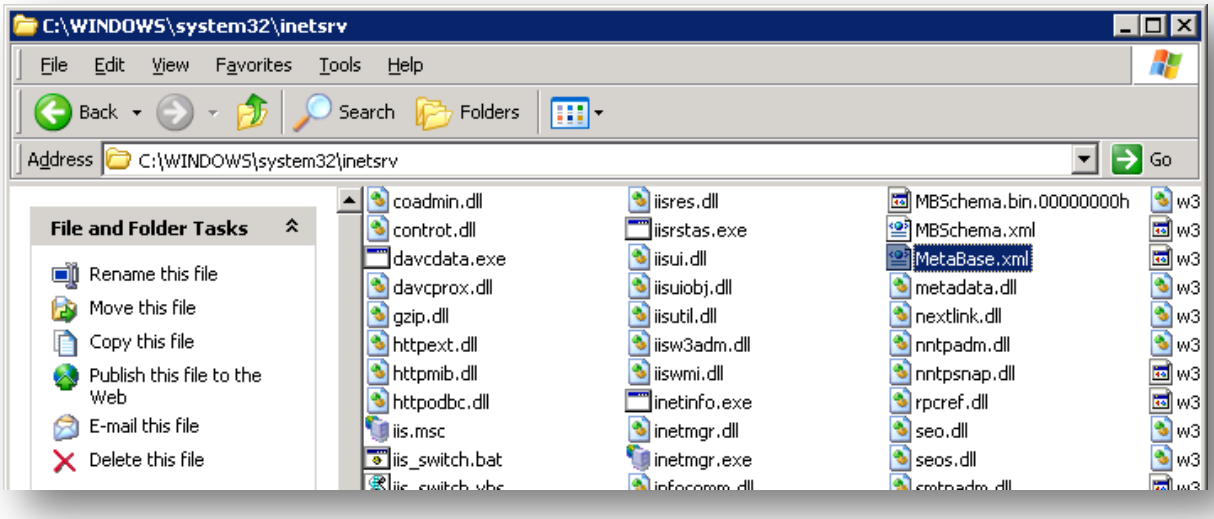
**IMPORTANT**

This step of the process **CANNOT** be performed while Singleview is in use, as it requires a shut down and restart of the web-server.

This step of the process can, however, be performed well in advance of the main migration, as it has no impact on the system's support for Office 2003.

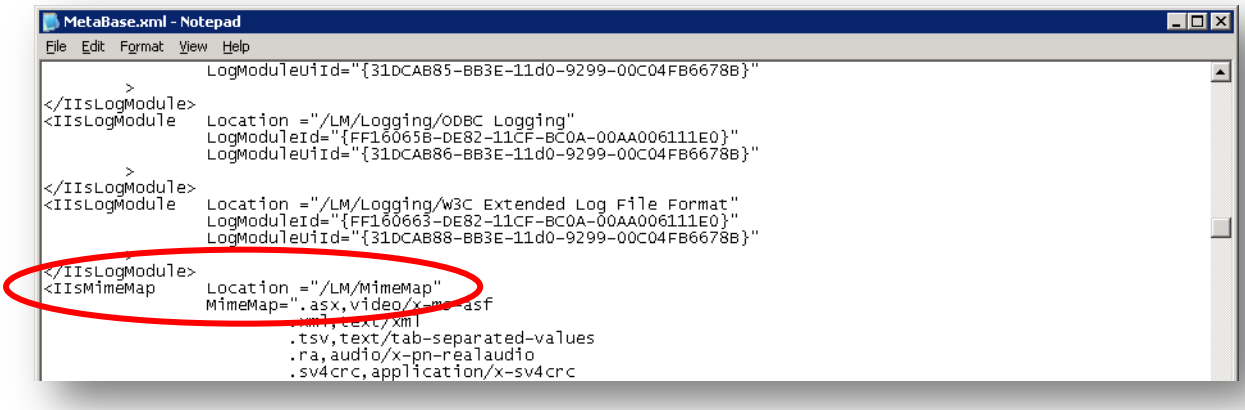
The majority of Singleview installations use Windows Server 2003 (which incorporates IIS 6). This version of IIS was released well before Office 2007, and so doesn't have integrated support for its file formats. This can be resolved with a manual change.

1. Log onto the Singleview Application/Web server as an administrator
2. Stop IIS
3. Navigate to **C:\WINDOWS\system32\inetsrv** and locate a file called **MetaBase.xml**




4. Right-click on this file and select 'Edit' to open the file in Notepad.

5. Search for the **<IISMimeMap Location="/LM/MimeMap" …>** element




6. Scroll to the end of this section of the file,, and then add some additional entries for the new Office file formats as follows:

```
.docm,application/vnd.ms-word.document.macroEnabled.12
.docx,application/vnd.openxmlformats-officedocument.wordprocessingml.document
.dotm,application/vnd.ms-word.template.macroEnabled.12
.dotx,application/vnd.openxmlformats-officedocument.wordprocessingml.template
.potm,application/vnd.ms-powerpoint.template.macroEnabled.12
.potx,application/vnd.openxmlformats-officedocument.presentationml.template
.ppam,application/vnd.ms-powerpoint.addin.macroEnabled.12
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.pptm,application/vnd.ms-powerpoint.presentation.macroEnabled.12
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.xlam,application/vnd.ms-excel.addin.macroEnabled.12
.xlsb,application/vnd.ms-excel.sheet.binary.macroEnabled.12
.xlsm,application/vnd.ms-excel.sheet.macroEnabled.12
.xlsx,application/vnd.openxmlformats-officedocument.spreadsheetml.sheet
.xltm,application/vnd.ms-excel.template.macroEnabled.12
.xltx,application/vnd.openxmlformats-officedocument.spreadsheetml.template
```
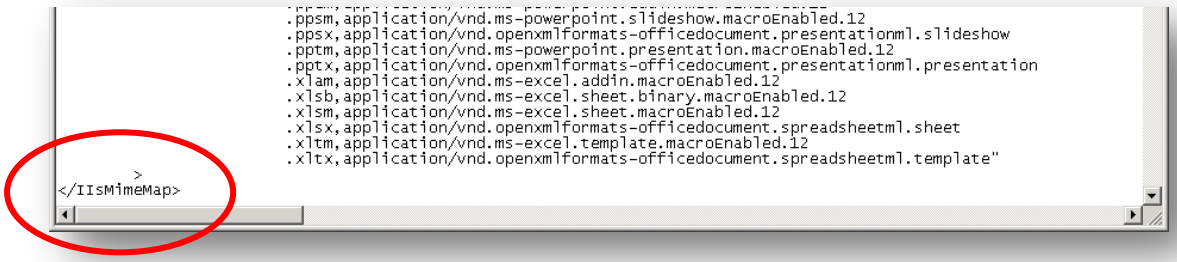

- Be sure to add only oneMIME type per line.
- Make sure that these new entries appear *before* the closing ‘**>**’ and **</IISMimeMap>** elements.



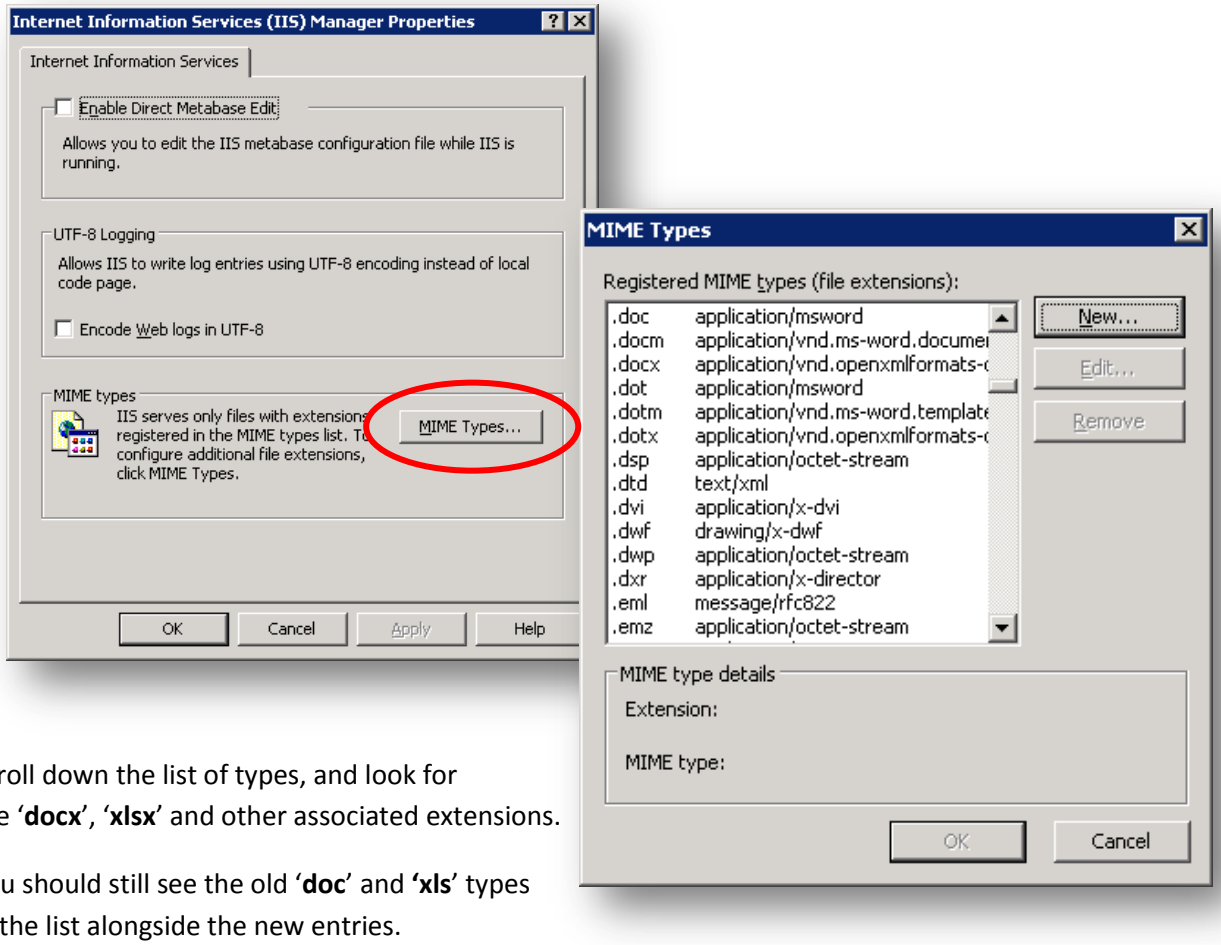

7. Save and close the changed Metabase file

8. Restart IIS (Or even the whole server, if that’s an option).

Once the server is back up and running, you can verify that IIS has successfully incorporated the new file types by launching IIS Manager and accessing the IIS Properties form…

Right-click on 'Internet Information Services' in the 'Computer Management' utility and select '**Properties**'…

Click the '**MIME Types..**' button to open the MIME Types form…




Scroll down the list of types, and look for the '**docx**', '**xlsx**' and other associated extensions.

You should still see the old '**doc**' and **'xls**' types in the list alongside the new entries.

## STEP 2 - SINGLEVIEW DATABASE CHANGES

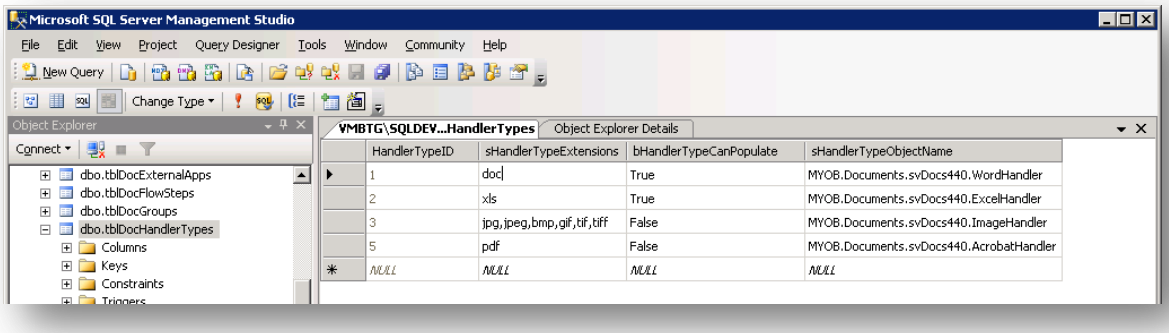
Singleview will happily accept any file you throw at it for filing, but it only activates certain features when it knows that they are appropriate for the file it's being asked to handle.

- The 'check out' menu option only appears for files that Singleview is sure can be successfully edited in Word/Excel.
- Optical Character Recognition is only attempted on files that Singleview is sure will be accepted by the OCR engine.

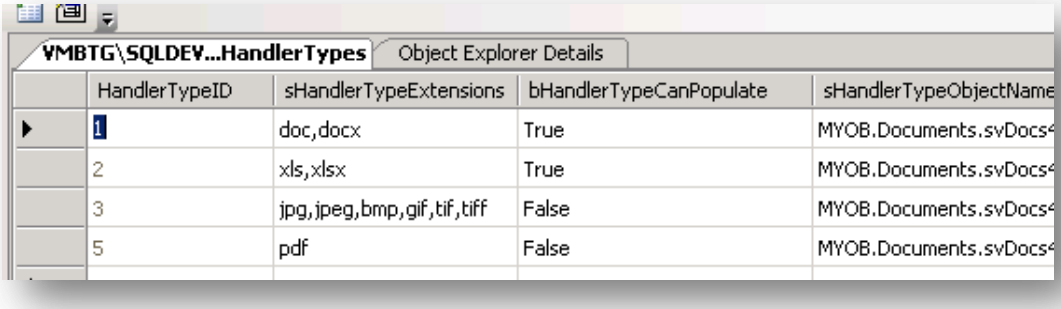
Singleview determines these things by looking at the file extension of the document. This means that a standard Singleview installation recognises **DOC** and **XLS** as Office documents, but will NOT recognise **DOCX** and **XLSX**.

Singleview stores its list of special file formats in a table in the SVControl420 database called **tblDocHandlerTypes**. If a file extension is not recorded in this table, then Singleview will refuse to activate any special editing features.

1. Log onto the Singleview Database Server (Probably your main SQL Server) open SQL Server Management Studio and navigate to the **SVControl420** database.
2. Locate the **tblDocHandlerTypes** table, right-click on it and select 'Open'




3. Locate the database rows that show 'doc' and 'xls' and edit the '**sHandlerTypeExtensions**' field so that it lists both the old 'doc' and the new 'docx' extensions (separate the two extension types with a comma – see screenshot below).




Close SQL Server Administration Studio and log off the server.

## STEP 3 - UPDATE THE INDEXING SYSTEM

To ensure that the Singleview indexing system can properly interpret and index the contents of the new document types, you should update the Index Server system.

Microsoft have published a couple of 'Filter Packs' that incorporate these updates. Download the appropriate version to the Singleview Application (Web) Server and run it.

### MICROSOFT OFFICE 2007 FILTER PACK

This pack supports Windows 2003 Server (32 or 64-bit versions)

http://www.microsoft.com/download/en/details.aspx?displaylang=en&id=20109

### MICROSOFT OFFICE 2010 FILTER PACK

This pack is the latest set of Ifilter updates from Microsoft. It only supports Windows Server 2003 SP2 or later (32 or 64 bit), so if you are still on an older version, then use the 2007 filter pack (the difference is marginal).

http://www.microsoft.com/download/en/details.aspx?id=17062

## STEP 4 - INSTALL OFFICE 2007 ON THE SINGLEVIEW SERVER

**IMPORTANT**

This step of the process **CANNOT** be performed while Singleview is in use, as it requires a shut down and restart of the web-server once Office has been installed.

**MORE IMPORTANT**

I recommend installing Office 2007 on the server – even if you are deploying Office 2010 on the desktops. To my knowledge, NO testing has been carried out with Office 2010 on the Singleview server. It might be fine or it might not!

Singleview uses a copy of Microsoft Office on the server itself to create new documents from templates. This install must be upgraded before Singleview can properly create DOCX and XLSX files from templates.

The install of Office is entirely straightforward.  You need only install Word. Excel, PowerPoint and Outlook (so that the server can identify those file types, and so that Word/Excel can be launched for document creation).

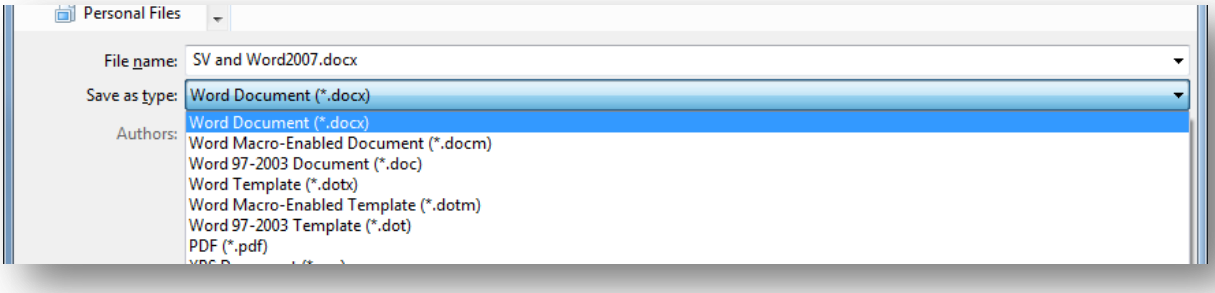
You are allowed to install Office 2007 alongside Office 2003 (Outlook is the exception, but Word/Excel are perfectly happy to co-exist with their predecessors).  Windows will set the most recently installed product as the default to use when a document is selected.  Having said that, I recommend REMOVING Office 2003 once the new installation is confirmed as operational.

**IMPORTANT – After installing, REBOOT the server and then log into the server as the 'Singleview' user and launch each application at least once to ensure that any 'first use' popup dialogues are dealt with so the software opens cleanly in future.**

## CONVERTING TEMPLATES

To convert a Singleview template, the process is quite straightforward.

1. Open the template document in a copy of Office 2007/10
2. The document will open, displaying the '(Compatibility Mode)' message in the title bar..
3. Use 'File – Save As' and select **'Word Document (*.docx)**' from the list of types.




4. Save the document to a NEW folder (don't put it back alongside the original template, or everyone will get confused!).
5. Repeat for all templates
6. When you are ready, you can edit Singleview's 'Template Library' settings (In the Singleview Administration Console) to point at the new folder and remove the entry for the old templates folder. Users won't notice the change, but Singleview will instant start offering the new templates during document creation.

### TEMPLATES WITH MACROS

As a security measure, Office 2007 disables macros in documents. The only way you can now run a macro in a Word document is if it as saved as a special 'Macro-enabled Document' with a distinctive **DOCM** file extension.

If your Singleview templates incorporate macros (to control clever printing functions, for example) then you MUST save the template as a '**Word Macro-enabled Document (*.docm)**'

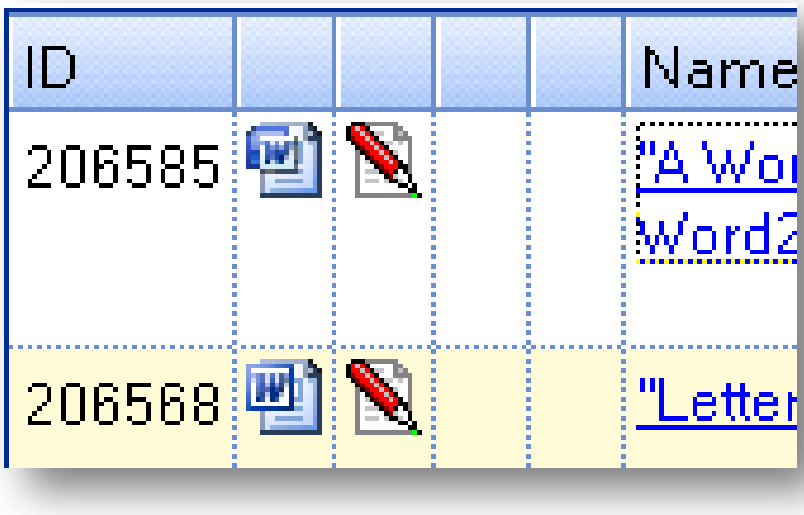
You must also then add the '**DOCM**' extension to Singleview's database (as described in 'Step 2' a few pages earlier).

## IN OPERATION

Once the upgrade is completed, Singleview will be able to handle both old and new documents formats alongside each other.

### NEW ICONS

In Document Lists, Office 2007/10 documents appear with the new 2007-style icon.




In the screenshot above, the upper document is Word 2007 format, and the lower document is Word 2003 format. In all other respects, Singleview treats both the same.

### CONVERTING DOC TO DOCX

If a user 'checks out' a 2003 format document and uses 'Save As' to convert the document to Open XML, then Singleview will NOT recognise the new document, and problems will occur (saving in the new format changes the filename, and Singleview won't expect that, so will not be able to find the revised document when the user tries to check it in).

**In short – Don't Do It!**

If a user wishes to convert a document from one format to another, then this can only be done by :

- Opening the document to be converted (no need to check out)
- Using 'Save As' to save a NEW (converted) copy of the document to the network or desktop
- Using Singleview's UPLOAD feature to submit the converted document back to Singleview as a new document.